

THE PROBLEM

From its inception, Comfort Insurance & Finances managed their agency through paper files and Excel spreadsheets. However, they found it nearly impossible to efficiently manage their growing agent base, properly process commissions, and focus on anything else outside of trying to maintain their data. Their commissions processing alone would take 2 weeks each month to compare each line item for each agent per carrier. Nothing was centrally located or linked, so managing policies, agents, commissions, and clients was incredibly time-consuming. To make matters worse, human error within the data was extensive making it difficult to rely on the data to make business decisions.

“AgencyBloc has been our time-saver and has helped our agency truly organize all of our operations. Way back to when Steve first talked to us and Tasha trained us, every person at AgencyBloc has been so helpful. It really says a lot about who you guys are and what kind of company you run.”

Alex C., Comfort Insurance & Finances

OUR SOLUTION

“We needed to join the 21st century and get our business organized.” After previous experience with other CRM systems, they knew they wanted something industry-specific, cloud-based, and easy to use. They sought a system that was straightforward and made sense so it’d be more widely adopted. “As soon as we saw how easy it was to use and how simple it made commissions processing, we were sold. It was a light bulb moment for us. AgencyBloc was exactly what we needed.” It was also important for them to have support. “Every person we’ve spoken with has been incredibly helpful which says so much about who you are as a company. It made us want to partner with you.”


THE RESULT


After a year with AgencyBloc, Comfort Insurance & Finances is extremely happy to have a central location for everything. “It wasn’t until we started moving to AgencyBloc that we realized how unorganized we were. Duplicates were a very serious problem, and there were numerous errors. With AgencyBloc, we feel 100% confident that our records are now error-free and tracking properly.” AgencyBloc has simplified their commissions and made managing their growing agent base so much easier. They **save \$5,000 a month** solely on time spent processing commissions and are now able to **recoup 100% of their missed payments**. Utilizing rate tables, commission import maps, and payee schedules have streamlined their entire process. The agency extensively uses Activities to stay on track and are starting to integrate more automation to make them even more efficient. “Our agents love the accountability AgencyBloc gives them and the organization for their personal books of business.” Using the Agent CRM plan and the Agents tab, Comfort Insurance & Finances **saves 50+ hours a month** managing their large agent base. “From A-Z, AgencyBloc **saves us over 50% of our time** giving us the chance to focus on other revenue-generating opportunities.”




Comfort Insurance & Finances is a Miami-based agency built for the Spanish-speaking community. Family-owned and quickly growing, they manage agents throughout the country offering health, life, Medicare, and P&C.

 Comfort Insurance & Finances
www.comfortif.com

 # of employees: 9
of agents: 50

 Specialize in:
• Health & Life
• Medicare
• P&C

 Previously using:
Paper & Spreadsheets